



Rehabilitative Services Division • Visual Services Division



# STRATEGIC PLAN 1994 - 1996

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MISSION STATEMENT:

PROMOTING WORK AND  
INDEPENDENCE FOR  
MONTANANS WITH  
DISABILITIES

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DEPARTMENT OF  
SOCIAL AND REHABILITATION SERVICES



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STATE OF MONTANA

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September 1993

Dear Rehabilitation Community Member:

I am pleased to share with you a copy of the Montana Vocational Rehabilitation Divisions' Strategic Plan for 1994-1996. Vocational Rehabilitation serves eligible persons who have a physical or mental impairment which constitutes or results in a substantial impediment to employment. My staff and I are proud to have the privilege of serving Montanans with disabilities and we are grateful for your support.

This strategic planning document represents the work and input of literally hundreds of Montana citizens, both inside and outside the Vocational Rehabilitation program. As our planning development ends, the implementation has just begun. Further discussions have included suggestions on how we might improve the planning process as well as how to involve our key stakeholders in increasingly meaningful ways to address key agency issues.

As you can see, Montana's strategic planning process is not static. This document is merely a snapshot in time, an attempt to depict our work to date, and to forecast our visions and challenges for the future.

On behalf of our entire staff, the Vocational Rehabilitation Advisory Council, and the State Independent Living Council, I thank you for your commitment to Montana's citizens with disabilities.

Sincerely,

A handwritten signature in dark ink, appearing to read "Joe A. Mathews".

Joe A. Mathews, Administrator  
Rehabilitative/Visual Services Divisions





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## DEFINITIONS

**STRATEGIC PLAN** - A disciplined effort to produce fundamental decisions and actions that shape and guide what we do and why we do it.

**MISSION** - The social justification and purpose for our existence.

**STRATEGIC ISSUE** - A fundamental policy choice affecting and affected by our mandates, mission, values, service level and mix, clients or users, cost, financing, organization or management.

**VISION** - A "best" picture of our agency that helps define what we are about.

**STRATEGY** - A pattern of purposes, policies, programs, actions, decisions or resource allocations that defines our direction in relation to our environment.

**ACTION AREA** - Major action area or activity, within existing job description, to implement our strategies.

**STAKEHOLDER** - Any group or individual who is affected by or who can affect the future of our organization (customers, clients, employees, suppliers, legislators, employers, etc.).

**CONSUMER** - Someone who receives the product of our work. They can be inside or outside our agency.

**COLLABORATORS AND COMPETITORS** - Entities that contribute to the accomplishment of our mission, or compete for our resources.

**MVR** - Montana Vocational Rehabilitation Division

## PREFACE

The Montana Vocational Rehabilitation (MVR) program has consistently been building efforts toward becoming a total quality organization. As these efforts have progressed, the need for a strategic plan has become apparent.

The strategic plan contained in this document is intended to clarify MVR's vision, direction, purpose, and priorities and to define and assure the quality of our services and outcomes to our consumers in a changing environment. This plan represents our efforts to provide an overview of the major issues facing our vocational rehabilitation program in the 90's. Its contents are intended to communicate this information to our employees, Montana's inclusive rehabilitation community, our existing and future consumers, their advocates and the citizens of Montana.

MVR conducted public forums on the formation and development of the State Plan, Independent Living State Plan, and **STRATEGIC PLAN**. A Strategic Planning Committee consisting of four representatives from the advisory councils was organized to give direct evaluation, input, and guidance on the development of this strategic plan.



## INTRODUCTION

This strategic planning initiative documents Montana Vocational Rehabilitation's first planning effort. It includes how the agency plans to deal with the major strategic initiatives it will be facing over the next three years, as well as the process used to develop our plan. Continuing statewide studies are a basis for the effectiveness of the MVR program, and are utilized in the development of this strategic plan. The strategic issues and action areas mentioned in this plan make up MVR's Strategic Plan Objectives beginning October 1, 1993 and ending September 30, 1996.

The philosophy of Total Quality Management (TQM) is inherent in the plan and all of our planning processes. The agency management team utilized consensus building and strived for a customer focus in developing this plan. MVR solicits and extensively uses input from key stakeholders, with the most extensive input generated from our VR and Independent Living Advisory Councils, and the members of our staff.

Deployment and implementation of this strategic plan will occur through regular communication among agency management, the staff of both the Rehabilitative/Visual Services Divisions and our key stakeholders. Agency activities will gradually become aligned with the strategic issues of the plan through oversight of issues by a member of the agency management team.

MVR's strategic thinking is intended to be a living process. Strategic thinking responds to changes in our environment and works to affect and insure changes in our program to meet consumer needs. In addition, as part of implementing a TQM philosophy, the implementation of this plan will be continually evaluated to insure its ability to provide guidance. Strategic thinking and continuing evaluation necessitate a dynamic plan over time.

MVR's strategic plan as developed contains specific criteria for determining whether the objectives have been achieved, an assurance that the state will conduct an annual evaluation to determine the extent to which the objectives have been achieved, and if objectives have not been achieved, the reasons why.

MVR's strategic planning efforts parallel the massive efforts at the national level to successfully implement the Americans with Disabilities Act and the 1992 amendments to the Rehabilitation Act of 1973. MVR believes the results of these efforts are mutually reinforcing.

## PLAN FORMAT

This plan is divided into three parts. Part I contains the agency mission and organizational values. MVR will address the major strategies.

Part II contains a graphic overview of MVR's mandates and our external and internal environment. The environment scan has given our management team a good perspective on external opportunities as well as our internal strengths and weaknesses.

Part III contains strategic issues and action areas developed by the strategic planning team.



## STATEMENT OF PHILOSOPHY

The Montana Vocational Rehabilitation Philosophy is to allow for dynamic management to progressively and proactively provide a wide scope of quality rehabilitation services to individuals with disabilities.

The Montana Vocational Rehabilitation agency focuses human energy to maximize the potential of promoting work and independence for Montanans with disabilities. People with disabilities are a valuable resource for Montana - a resource society cannot afford to waste.

The Montana Vocational Rehabilitation agency is committed to including in our planning process all those who are stakeholders in our operations - consumers, potential consumers, disability advocates, taxpayers, employees, elected officials, and advisory councils.

We must listen to and measure customer satisfaction, cherish front line people, respond quickly to customer needs, focus obsessively on quality, and provide leadership to create the visions of the future.

Our service delivery system is driven by the philosophy that consumers must be involved in decisions about services designed to benefit them. Just as our consumers are involved in individual plans for their own rehabilitation and independent living, the Rehabilitation Advisory Council and Independent Living Advisory Council are involved in the agency's program of services and state plan development that will benefit everyone.



## **PART I: STRATEGIC PLAN MISSION/VALUES**

### **OUR MISSION:**

**PROMOTING WORK AND INDEPENDENCE FOR MONTANANS WITH DISABILITIES.**

### **OUR VISION**

**A working partnership with our consumers to assist them in accessing jobs and independence.**

Our vision describes our future and what we seek to become as a staff. It is a picture of what we want to be and how we want to work together. Our goal is a sense of shared vision among all members of Montana's inclusive rehabilitation community so that the energies of the organization can come together to accomplish our mission. Our vision includes our values:

### **OUR VALUES:**

**MVR values an enhanced and expanded service delivery system that is responsive to the essential needs, dignity, and rights of Montanans with disabilities:**

- A. We value people getting their needs met and providing quality services that lead to quality employment and independent living outcomes;
- B. We value ourselves as individuals and rehabilitation professionals and we value our working relationships with co-workers and our ability to serve our consumers;
- C. We value all employees and their combined efforts to serve consumers; we commit to identifying potential and recognizing achievement;
- D. We value involving advocates and persons with disabilities in our planning and policy development efforts;
- E. We value advocating for the rights of Montanans with disabilities.



**MVR values the collective contribution of all staff and encourages staff participation in the achievement of agency mission and goals:**

- A. We value recruiting, employing, and promoting qualified staff;
- B. We value open and honest communication;
- C. We value providing staff opportunities for personal and professional growth;
- D. We value developing clear and reasonable performance expectations for all levels of staff; we commit to rewarding good effort by celebrating accomplishments whenever possible;
- E. We value the encouragement of staff creativity and innovation.

**MVR values the maximum acquisition and the efficient and effective utilization of all comparable benefits and resources:**

- A. We value applying all comparable benefits and other resources;
- B. We value increasing legislative support to have stable and adequate funding;
- C. We value developing a streamlined and functional management information system that measures the effective use of resources and puts the client first;
- D. We value the development and use of appropriate technological advancements wherever possible;
- E. We value the development of an agency leadership philosophy that challenges the process and promotes creativity, innovation, staff participation, teamwork, and "world class service";
- F. We value developing, instilling, and enforcing standards of professional behavior (ethics) for all members of the staff.

**MVR values and requires substantial support from the public:**

- A. We value a positive public image and understanding via informing the public of the MVR mission and goals regarding a barrier free society, advocacy, services, and program benefits;

- B. We value open, positive and healthy communication to facilitate respect for one another as we develop partnerships with business and industry;
- C. We value a positive public image as professionals and feel that communication is the tool that encourages greater staff commitment and responsibility for development of community based agency support;
- D. We value enhancing the image and perception of MVR efforts at the local, state, and national levels;
- E. We value the rights of all Montanan's.

## **PART II: ENVIRONMENTAL SCAN**

### **ENVIRONMENTAL SCAN**

The list of terms below explains the graphic representation of MVR's planning process.

#### **MANDATES**

Laws, rules, policies and various legal requirements to which MVR must adhere.

#### **EXTERNAL ENVIRONMENT**

**Stakeholders:** Individuals, groups or organizations that can make a claim on our attention.

**Collaborators and Competitors:** Entities that contribute to the accomplishment of our mission, or compete for our resources.

**Forces and Trends:** Social, economic, cultural or political factors that now have or will have an impact on our agency and its purpose.

#### **INTERNAL ENVIRONMENT**

##### **Resource Assessment**

**Personnel Development:** Overall staff development.

**Financial:** The condition of our current and future funding.

**MMPI:** Montana Management Program Initiative.



## OUR MANDATES

Mandates are the laws, rules, policies, contracts or other legal requirements that define what we do within the state/federal vocational rehabilitation program. Authority for the operation of the Montana Vocational Rehabilitation Program is provided by the Rehabilitation Act of 1973 (P.L. 92-112) as amended in 1992, (P.L. 102-569) and the Montana Codes Annotated. The policy manual contains regulations for the conduct of the state vocational rehabilitation program. It provides policy for the provision of rehabilitation services to individuals with disabilities, and its intent is that all phases of this manual shall comply with and shall fully implement the requirements of the federal law and regulations, as well as state law and requirements.

The State Plan and the Independent Living State Plan, submitted annually to the Rehabilitation Services Administration (RSA), obligate MVR to carry out all required aspects of the federal regulations.

## OUR EXTERNAL ENVIRONMENT

An external environment is made up of major stakeholder's, collaborators, competitors, and forces and trends potentially affecting the organization.

**Stakeholders:** Stakeholders are any individual, group, or organization that can make a claim on MVR's attention, resources, or output--or who are affected by the work of MVR. MVR identified the following stakeholders as the major ones:

Clients	Taxpayers
Vendors	Legislators
Employers	Referral Sources
Employees	Council Members

MVR makes a special effort to communicate with the agency's major stakeholders to determine what they expect from MVR and what their level of satisfaction is with the agency.

**Collaborators/Competitors:** Collaborators are those entities whose activities contribute to, enhance, or in some way help MVR's ability to carry out its basic mission. Competitors are those entities who are competing (consciously or unconsciously) for resources which MVR needs to carry out its basic mission. Sometimes a collaborator can also be a competitor and vice versa.



## **Collaborators**

Some of our collaborators include our federal partner, Rehabilitation Services Administration (RSA), who provides technical support services on all aspects of rehabilitation; The Rehabilitation Advisory Council and Independent Living Advisory Council, who provide advice, direction, and recommendations as mandated under the Rehabilitation Act and its 1992 amendments; Legislators, who allocate the state funds to implement rehabilitation programs; Employers, who provide jobs that assist people with disabilities in becoming independent; Consumers, who form active partnerships with MVR staff and contribute positively to the public's understanding of disability(ies) as well as help advance the purpose and mission of the agency; MVR's central and field staff, who are the core of making the rehabilitation process work for individuals with disabilities in Montana; The Department of Social and Rehabilitation Services (SRS), who through all their offices and bureaus, help provide the management support services needed to function as an agency; and last, but certainly not the least, Families, who make up the greatest support group of all for disabled individuals.

## **Competitors**

Some of our competitors include bureaus within the Department of Social and Rehabilitation and all other state funded programs who compete for the state dollars MVR needs to capture federal dollars; Private-for-Profit Rehabilitation Programs that offer some of the same services that MVR provides, and can compete for clients and job placements; Community Rehabilitation Programs, who may compete for clients by promoting an expanded system of client choice of service providers.

## **Forces and Trends**

**Federal and State Funding:** The economics of scarcity will confront public sector agencies in Montana. The shortage of resources will require effective planning. MVR is not presently under an Order of Selection, other than following the national mandate of services first to the most severely disabled, with a secondary priority of services to public safety officers injured during the course of duty. MVR's ability to continue serving all clients under an Individual Written Rehabilitation Program (IWRP), to accept all applicants, to quickly determine eligibility, and to provide services are all indicators that MVR is meeting

the statutory and regulatory requirements without an Order of Selection.

**Work Force of the 90's:** The work force of the 90's will undergo substantial changes. There will be more participation in management by the workers through a focus on the commitment to operate the agency effectively and efficiently with an optimal degree of autonomy and the development of skills considered critical for independent functioning.

**Consumer Empowerment:** This trend reflects the increasing assertiveness of consumers (individuals and groups) who seek to become stronger partners in the administration of rehabilitation resources, and planning/implementation of rehabilitation services. We see this in the language of the 1992 amendments to the Rehabilitation Act which expanded choice and increased control of planning by consumers.

Staff will be challenged more frequently, and need more skills to develop best practices and processes for matching consumer demands with the realities of the agency and the employment market. The MVR Program will become more accountable, participative and open to meet the challenges of the 90's, and satisfy the intent of the 1992 Rehabilitation Act Amendments.

**Health Issues:** Future advances in health care will affect the types of persons who seek MVR assistance and the number and types of resources available to MVR to assist our customers in achieving their goals. We've seen the challenges that AIDS has brought and we are not sure what the future holds for new diseases that may impact available resources and numbers of persons served to a greater or lesser extent. We know that advances in health care and assistive technology devices and services will greatly impact our consumers and MVR's ability to meet the demands on resources and staff. This could also have an effect of increased expectations of the MVR system. All systems need to focus on interactions between health and disability--this is not always well understood.

**Redefinition of Support Systems:** Support systems have become increasingly diverse and include peer networks, health cooperatives, support groups, independent living centers, assistive technology consortiums, consumers (individuals and groups), providers, family support networks, peer networks, vocational centers, and higher education providers to just name a few. MVR must continue to recognize these support systems and nurture



their direct positive support in our endeavors to promote work and independence for Montanans with disabilities, which is our mission.

**Legislative Action:** The legislative season is always a time of great anticipation and increased anxiety. At the push of a button and stroke of the pen, political forces are unleashed that can have a dramatic impact on state dollars and our ability to match federal dollars. The Montana Legislature met in regular session in January 1993. Because of the state's poor financial outlook, few state budgets were increased or even maintained at current levels. It's been a trend in the last four years to maintain tax austerity through legislation and referendums by tax payers not wanting to pay more taxes for anything. MVR is continuing to intensify its efforts within the executive branch to ensure maintenance of adequate state dollars for match. MVR is continuing to strive to increase the number of active consumers and significant others who can convincingly lobby the Legislature.

## OUR INTERNAL ENVIRONMENT

### Resource Assessment

**Personnel Development:** MVR's service delivery system is labor intensive, utilizing the knowledge and skills of rehabilitation counselors, supervisors, rehabilitation teachers, and orientation and mobility specialists to assist persons with disabilities in attaining economic and social independence. The competence, and dedication of the people who work in the services delivery system in Montana are among the highest of priority issues confronting our rehabilitation program during the next several years. MVR made the important decision to integrate human resource development/human resource management principles into the agency's overall management philosophy.

Montana's system of comprehensive personnel development has seven major components:

1. Organizational Development
2. Organizational/Job Design
3. Human Resource Planning
4. Selection and Staffing
5. Training and Development
6. Career Development
7. Performance Management Systems

MVR recognizes the need for continuous personnel development at virtually all levels of staff.

**Financial:** MVR faces challenges due to limited state match funds and a statewide tax revolt by citizens that may force a special legislative session in 1993 which could cut 72 to 100 million dollars in order to balance the state budget. Unpredictable dollar levels have always been difficult and force the agency to be very flexible and creative in providing a continuation of services to all consumers who are eligible for cost services.

**Montana Management Program Initiative (MMPI):** The MVR and the University of Georgia Human Services Management Institute introduced a new system of management. This system is called the Montana Management Program Initiative. The provision of quality services to Montanans with disabilities, program accountability, and integrity are essential features of this system. These features are possible only with some degree of management control and recognition that statutory requirements must be met. Leader capability and commitment to operate the agency effectively and efficiently are required. Several components are necessary to reach that capacity:

1. Clearly defining the agency's mission and establishing goals and objectives.
2. Communicating agency goals to all members of the organization.
3. Assuring that all actions are consistent with the mission and contribute to the accomplishment of agency goals.
4. Acquiring and appropriately using human and financial resources.
5. Objectively evaluating the performance of the organization.
6. Providing all employees reliable and valid feedback on their performance.
7. Recognizing problems and developing and implementing plans for their solution.



MVR intends to be recognized as an organization in which goals are clearly defined, resources and structure are appropriate for their accomplishment, and a network for communication and feedback exists between those who lead the agency and those who work in it.

## PART III: STRATEGIC ISSUES/ACTION AREAS

### STRATEGIC PLAN OBJECTIVES

#### EMPLOYMENT,EMPLOYMENT,EMPLOYMENT

**STRATEGIC ISSUE #1:** MVR finds that work is a valued activity, both for individuals and society; and fulfills the need of an individual to be productive, promotes independence, enhances self-esteem, and allows for participation in the mainstream of life.

**VISION:** That all individuals with disabilities have the same economic opportunities for employment and independence as all other Montana citizens.

**STRATEGY 1:** Individuals with disabilities, including individuals with the most severe disabilities, have demonstrated their ability to achieve gainful employment if appropriate services and supports are provided.

#### ACTION AREAS:

- \* Continue to work with consumers, collaborators, and stakeholders to eliminate barriers which diminish the ability of persons with disabilities to secure employment. These may include:
  - Discrimination in employment policies and practices.
  - Lack of transportation, especially accessible transportation.
  - Inability to secure assistive technology to modify jobs.
  - Lack of physically accessible worksites.
  - Lack of quality educational and training options.
- \* To implement the spirit of strategic planning, MVR must take full advantage of the ADA. The ADA focuses on providing opportunities that impact on state and local governments as well as business and industry.
- \* To support the Assistive Technology Program (The MonTECH Program) in getting the Governor of Montana to assure that state government will follow Section 508 of the Rehabilitation Act of 1973, as amended, dealing with electronic and information technology accessibility. This would assure that persons with disabilities who work in any state agency have access

to information and data, comparable to the information and data, and access respectively, of individuals who are not disabled.

- \* MVR will maintain employment directed outcomes as the core program for rehabilitation services.
- \* MVR promises to see that the program activities are carried out in a manner consistent with the respect for individual dignity, personal responsibility, self-determination and pursuit of meaningful careers, based on informed choice, of individuals with disabilities.



## **WORLD CLASS SERVICE/QUALITY OF SERVICE**

**STRATEGIC ISSUE #2:** MVR will access and parlay resources to serve the customer.

**VISION:** To enhance customer service through collaborative and creative resources utilization.

**STRATEGY 2:** To expand external collaborative efforts.

### **ACTION AREAS:**

- \* Encourage understanding of outside agencies and resources to promote use of these resources.
- \* Clarify and enhance mutual understanding of outside agencies and resources to promote use of these resources.
- \* Continue to educate referral sources, agencies, and advocacy groups in MVR's services and processes for delivering those services.
- \* Develop services leading to outcomes jointly with consumers and counselors consistent with consumer choice.

**STRATEGY 2.1:** To undertake continuous improvement for efficiency; improve the efficiency of resource development.

### **ACTION AREAS:**

- \* Streamline organizational management practices to expedite and provide timely services through the Montana Management Program Initiative (MMPI).
- \* Review case management system to determine minimum requirements for program compliance with intent of eliminating all practices that do not add value to the system.
- \* Continue to clearly define the agency's mission and establish goals and objectives to enhance the overall system.
- \* Assure that all actions are consistent with the mission and contribute to the overall accomplishment of the agency goals.



- \* Develop a program (MMPI) that facilitates optimal rehabilitation agency performance through the application of a management system which eliminates unnecessary and spurious controls, and utilizes performance criteria maintained by skilled professionals.
- \* Seek to focus on maximizing the appropriate utilization of case service funds through adhering to prescribed agency policy for case service fund expenditures.
- \* Seek to continue to focus on a timely and comprehensive assessment of rehabilitation needs including an assessment of an individual's career interests.
- \* Undertake a focus on the timely identification of physical or mental impairments that substantially impede employment.
- \* Continue to utilize comparable benefits and other financial resources when appropriate.
- \* Continue our partnership with our federal RSA Region VIII office staff to receive technical assistance in all aspects of adherence to the 1973 Rehabilitation Act and the 1992 amendments.

## STAFFING/HUMAN RESOURCE DEVELOPMENT

**STRATEGIC ISSUE #3:** MVR enhances and expands a services delivery system that is responsive to the essential needs, dignity, and rights of Montanans with disabilities.

**VISION:** To have a service delivery system that is responsive to the essential needs of Montanans with disabilities.

**STRATEGY 3:** To help people get their needs met and provide quality services that lead to quality employment and independent living outcomes.

### **ACTION AREAS:**

- \* Assure that eligibility determination is kept within the mandated 60 day period.
- \* Assess human and financial resources to determine the ability of the agency to provide services to all eligible individuals.
- \* Train all staff in methods for process improvement that's tied into consumer needs and expectations.
- \* Develop consistency in statewide delivery of services through uniform interpretation and understanding of the Montana Management Program Initiative, and any other policies and procedures.
- \* Make sure the consumer has fully participated in the development of their comprehensive assessment of rehabilitation needs.
- \* Develop ourselves as individuals and rehabilitation professionals, and our ability to serve our customers and provide quality services will expand.
- \* Continue, through our advisory councils and public hearings, to seek advice and counsel in the involvement of MVR's planning and policy development.

**STRATEGIC ISSUE #3.1:** MVR will value the collective contribution of all staff and encourages staff participation in the achievement of agency mission and goals.

**VISION:** To have all staff contribute and participate in the achievement of agency mission and goals.

**STRATEGY 3.1:** Recruit, employ, and promote qualified staff.

## ACTION AREAS:

- \* Seek to match individuals and their career needs and capabilities with jobs and career paths.
- \* Train and develop key competencies that will enable MVR staff to perform current or future jobs.
- \* Assure that through a systematic training needs assessment individuals career planning and the needs of the agency can achieve an optimal match of individual and agency needs.
- \* Assure staff and agency goals are linked and what staff do on a daily basis support the overall mission and values of the agency.
- \* Implement a number of initiatives designed to increase staff knowledge at all levels.
- \* Vigorously supports the possibility of a federal grant application to bring Long Distance Learning Technology to our staff. This would bring training via satellite technology to the staff in their own job sites.
- \* Establish an organizational environment which encourages creative leadership and management, teamwork, integrity, accountability and excellence for all employees.
- \* Values open and honest communications with all staff and will continue to expand this effort.
- \* Continue to encourage the creativity and innovation of all staff.
- \* Continue to develop clear and reasonable performance expectations by expecting and rewarding good effort and achievement.



## ACCESSIBILITY

**STRATEGIC ISSUE #4:** MVR will provide a service delivery system which ensures services are provided to all eligible consumers in all areas of the state as equitable as possible.

**VISION:** To have a services delivery system in which services are provided to all eligible consumers around the state as equitable as possible.

**STRATEGY 4:** To maintain an adequate work force to provide accessibility on a statewide basis.

### **ACTION AREAS:**

- \* MVR will try to keep field offices adequately staffed.
- \* Assure that vacant staff positions will be advertised and promptly filled as soon as possible in order maintain a MVR presence in all areas of the state presently served.
- \* Continue to maintain present Full-Time Equivalent (FTE) position numbers by emphasizing a strong justification to the Legislature concerning accessibility to services statewide.
- \* Evaluate on an annual basis the statewide coverage and distribution of FTE's and, if necessary, make adjustments to assure services can be accessed by eligible consumers.
- \* Continue to support and give technical assistance to any Montana Section 130 Native American Indian Vocational Rehabilitation Projects so disabled American Indians can have access to rehabilitation services. On those reservations where no 130 projects exist, MVR assures that a state MVR counselor will provide service coverage to eligible consumers.
- \* Continue to maintain as many cooperative agreements as possible to facilitate coordination and cooperation in areas of accessibility and service resources.
- \* MVR will see that, to the maximum extent possible, alternative communication provisions will be provided in native language, or other modes of communication so consumers may have the most appropriate access to the rehabilitation process.

- \* Continue to strive to serve all clients under an Individualized Written Rehabilitation Plan (IWRP), to quickly determine eligibility, and to provide services to satisfactorily meet the statutory requirements without an Order of Selection.
- \* Implement an educational campaign to focus on the mission of MVR, clarify our identity, thereby increasing the accessibility of MVR programs.

## STATEWIDE SATISFACTION SURVEY/NEEDS ASSESSMENT

**STRATEGIC ISSUE #5:** It's important for MVR to find out from its consumers what they think of the services that have been provided so we can evaluate the overall quality of the Vocational Rehabilitation Program.

**VISION:** To provide the best quality vocational rehabilitation service that will meet the needs of the consumer.

**STRATEGY 5:** Continue to conduct a follow-up survey of former consumers.

### **ACTION AREAS:**

- \* Continue to conduct monthly satisfaction surveys on consumers who have participated in the rehabilitation process.
- \* Use the satisfaction survey information to evaluate and improve the quality of services in each field office.
- \* See that a quarterly report is developed from the survey information and sent to Human Service Managers and Visual Service Supervisors in the district field offices.
- \* Continue to encourage Human Service Managers and Visual Services Supervisors to use the survey information to evaluate the quality of services they are providing, and make changes or adjustments to improve services if needed.



## FUNDING

**STRATEGIC ISSUE #6:** MVR will ensure ongoing provision of rehabilitation services by securing and maintaining appropriate funding through federal and state dollars.

**VISION:** To have appropriate funding to maintain a quality rehabilitation services delivery system.

**STRATEGY 6:** To maximize state and federal funding.

### ACTION AREAS:

- \* MVR assures that the mandated State Plan, Independent Living State Plan, and STRATEGIC PLAN are appropriately prepared, including all assurances, and mailed to RSA within the appropriate time period to receive Title I and Title VII funding on the federal level.
- \* MVR assures that the Rehabilitation Advisory Council and Independent Living Advisory Council have full participation in the development of the State Plans, and assure they have a more active role in advising MVR.
- \* MVR assures that all the federal assurances listed in the State Plan and Independent Living State Plan pre-print information are addressed to meet federal statutes, and that yearly amendments to the plans are submitted as needed.
- \* MVR assures that annually a budget for the agency reflects as accurately as possible the need for funding and its appropriate distribution to field offices.
- \* MVR assures that an appropriate budget is submitted to the Legislature to acquire general fund dollars to maximize federal matching funds necessary for the agency's function.
- \* MVR assures it will spend funds judiciously, and maintain appropriate accountability.
- \* MVR assures that despite all the uncertainties of funding, we will make every effort to maintain services to all eligible consumers.
- \* Continue to use JTPA, Workers' Compensation, and Social Security dollars where appropriate.

- \* Continue to maintain an ongoing dialogue with advisory councils to keep them abreast of funding issues.
- \* Continue to maintain working relationships with key collaborators, thereby increasing the use of similar benefits by rehabilitation counselors.
- \* Continue to seriously explore all state and community resources that could participate in the rehabilitation process.

## SUPPORTED EMPLOYMENT

**STRATEGIC ISSUE #7:** To expand supported employment to serve all eligible persons with traumatic brain injury, learning disabilities, as well as Native Americans with disabilities.

**VISION:** That all people with the most severe disabilities receive supported employment services when they need them with the appropriate balance of natural supports and publicly funded interventions available for as long as needed.

**STRATEGY 7:** To work with the Montana Supported Employment Development Project (MSED-II) to incorporate the recommendations generated through that project's activities and mission into the Montana VR agency.

### **ACTION AREAS:**

- \* Develop a system change implementation plan with the staff of MSED-II prior to the completion of the project.
- \* Conduct training for appropriate professionals on the blending of natural supports with public services throughout the state in order to extend current funding capacities.



## INDEPENDENT LIVING

**STRATEGIC ISSUE #8:** Stabilize funding for Montana's four Independent Living Centers (IL).

**VISION:** MVR and IL working in tandem on behalf of Montana's citizens with disabilities.

**STRATEGY 8:** This collaboration will: 1) provide clear delineation of appropriate roles and responsibilities for both the MVR and IL system; 2) assure that the consumer control of IL services and the professionalism of MVR programs will not be compromised by the collaborative relationship; 3) ensure that the MVR system can and will be responsive to the IL consumer and community advocacy functions, and that the Independent Living Centers/Independent Living Programs can be effective in contributing to vocational outcomes; and 4) have an overriding sense of teamwork that joins MVR and IL systems as well as other involved delivery systems in working collaboratively to help the consumer achieve his or her cultural and life-style choices.

### **ACTION AREAS:**

- \* Actively pursue adequate funding for both programs through administrative and legislative efforts.
- \* MVR's support and initiative regarding integrating IL services within the MVR services via fee for service strategy for IL Centers.
- \* Contract with IL Centers to participate in consumer forums to develop input for IL planning.

**STRATEGIC ISSUE #9:** Title VII, Chapter 2 Service Delivery.

**VISION:** Services are available to older blind which adopt the primary components of Montana's Rural Independent Living Project which includes the provision of Senior Companion services, user equipment lease, and radio reading services. This service strategy is funded from a partnership of Department of Education grant funds, and state and local resources i.e. Area Agency on Aging, Medicaid, county, and private funds. At the center of this strategy is Rehabilitation Center Services for the blind which are made available by the rehabilitation center team. This would make available a rehabilitation teacher and orientation mobility services co-aligned with professional and consumer driven counseling.

**STRATEGY 9:** See Action Areas.

**ACTION AREAS:**

- \* Develop a task force to study this issue that includes many interested parties.
- \* Approach the Montana Association for the Blind and Visual Services Division to take the lead in developing this task force.
- \* Include Montana's IL Council in the immediate and long-term development of this issue.

**STRATEGIC ISSUE #10:** The Americans with Disability Act implementation, monitoring and follow-up.

**VISION:** An office on disability which is adequately funded and promotes the implementation of the ADA.

**STRATEGY 10:** Additionally, the Montana's Disability Act works in tandem with the ADA and promotes statewide access. This office aggressively promotes technical assistance to all levels of government and private sector. Systems change is recognized as an equal partner with direct service provision. Consumers act as the primary advisory component to this office.

**ACTION AREAS:**

- \* Support and encourage consumer groups to become members of advisory councils and assist in the development of this effort.
- \* Explore the possibility of expanding the role of Montana Telecommunication Access Program to host the office of disability and increase or modify the current funding mechanism.



## TRANSITIONS

**STRATEGIC ISSUE #11:** To develop and implement a transitions plan that encompasses statewide equity and strategy to provide transitional services to all students on a timely basis.

**VISION:** To enhance transitional planning to ensure that all disabled students exiting school who require rehabilitation services shall receive those services without a break in the process.

**STRATEGY 11:** To expand involvement and cooperative efforts of all concerned agencies and entities by using formal interagency agreements that achieve for students exiting school the following required rehabilitation services:

1. Long term rehabilitation goals;
2. Intermediate rehabilitation objectives; and
3. Goals and objectives related to enabling students to live independently before they leave a school setting.

### ACTION AREAS:

- \* Negotiation of a formal interagency agreement with the Office of Public Instruction, the Developmental Disabilities Division of the Department of SRS, school districts, school transitional teams, and any other entities designated as appropriate.
- \* Designate lead agencies and qualified individuals responsible for implementing transitions.
- \* Design procedures for outreach and identification of students in need of transitional services.
- \* Develop a time-frame for evaluation and follow-up of students who have received transitional services.
- \* Formulate cross-training for respective education and VR staff to expedite more effective transitional efforts.

The Office of Public Instruction and Vocational Rehabilitation have jointly developed a federal transition grant that would enable the programs to address transitions to a greater degree, that would respectively link staff training efforts, and that would contribute more human development resources to transitions statewide. If the transitions grant is approved, there would be more action and full-time participation in transitions.



## ADVOCACY

**STRATEGIC ISSUE #12:** To join with consumers and leaders in local communities and at the state level to foster positive change in public policy, law, programs, and attitudes toward individuals with disabilities.

**VISION:** That all individuals, regardless of who they are or what disability they may have, will not be discriminated against.

**STRATEGY 12:** To join with others at all levels of state government and the community to foster change towards individuals with disabilities.

### **ACTION AREAS:**

- \* MVR will work with local and statewide leaders, human service agencies, and councils on issues related to employment, housing, transportation, and barrier free environments in hopes of changing policies that may discriminate.
- \* Continue to facilitate interagency services and support for individuals by fostering relationships with agencies serving mutual consumers.
- \* To increase knowledge and positive attitudes toward people and to work toward eliminating any barriers to advocacy.

**STRATEGY 12.1:** To advocate for and support the Client Assistance Program (CAP) that advocates for consumers rights within the rehabilitation program.

### **ACTION AREAS:**

- \* Continue to develop a close cooperative working relationship with the CAP in their effort to help consumers understand, pursue, and obtain vocational rehabilitation services.
- \* Provide for having the CAP representative on the Rehabilitation Advisory Council as required under the 1992 amendments to the Rehabilitation Act.

## ASSISTIVE TECHNOLOGY

**STRATEGIC ISSUE #13:** MVR will follow the mandated assurances to utilize rehabilitation technology services in providing assistance to an increasing number of individuals with disabilities.

**VISION:** To provide a broad range of rehabilitation technology services within the rehabilitation process to disabled consumers on a statewide basis.

**STRATEGY 13:** To integrate rehabilitation technology into the rehabilitation process.

### ACTION AREAS:

- \* Evaluate on an annual basis the statewide counselor use of the TECH POINT GUIDE program to assure counselors are using the tech point guide to effectively plan for technology services within the rehabilitation process.
- \* Through the MonTECH Program, Montana's Assistive Technology Project, a number of services are being provided and developed. MVR being the designated lead agency for the project will continue to encourage counselors to use these services in behalf of their consumers.
- \* Provide training on assistive technology services through the Region VIII RRCEP and the MonTECH professional staff.
- \* Monitor the Individualized Written Rehabilitation Plan (IWRP) to include a statement of the specific rehabilitation technology services provided to assist in the implementation of the objectives and goals of the IWRP.



## PROGRAM PLANNING AND EVALUATION

**STRATEGIC ISSUE #14:** To validate our commitment to the importance of planning and evaluation.

**VISION:** To have an organization that is committed to using planning and evaluation to operate the agency effectively and efficiently to reach the fullest capacity of its performance.

**STRATEGY 14:** To use program planning and evaluation to reach our full capacity of performance.

### **ACTION AREAS:**

- \* Clarify the agency's values to consolidate and integrate the agency's goals, mission, and services.
- \* Central office staff continues to travel to each field office to update personnel in program areas; holding public forums and sharing preliminary plans for future planning.
- \* Continue the implementation of the Montana Management Program Initiative.
- \* Continue program evaluation through the use of the statewide consumer satisfaction survey of all consumers in closed status to determine the agency's performance.
- \* Continue instituting task force committees to study and recommend areas for team building, computerization planning, streamlining, and improving field and central office operations.
- \* Continue to conduct the planning process for legislative sessions.
- \* Continue to monitor federal re-authorization activities throughout the next three years.
- \* Continue to seek and receive advice on program planning, development and evaluation from the two consumer oriented advisory councils. These councils will be used to help evaluate the program's objectives and activities on an annual basis.



## **BARRIER FREE ENVIRONMENT**

**STRATEGIC ISSUE #15:** MVR will continue implementation and adherence to the Americans with Disabilities Act and other barriers free initiatives.

**VISION:** To have a barrier free environment in employment, public accommodations, transportation, state and local operations, and telecommunications.

**STRATEGY 15:** To eliminate as many barriers as possible for individuals with disabilities.

### **ACTION AREAS:**

- \* To fully support the intent and spirit of the Americans with Disabilities Act and serve as a model to others.
- \* To help eliminate employment, attitudinal and physical barriers which inhibit disabled consumers in opportunities for employment.
- \* To eliminate any barriers which may inhibit MVR staff or consumers from accessing the rehabilitation process or that may interfere with providing services.
- \* MVR will continue as the designated lead agency to facilitate the ADA implementation in Montana, with primary focus on Title I employment activities (Executive Order 92-2).
- \* MVR will work with the Governor's Committee on Employment of Persons with Disabilities on issues of barriers and accessibility.
- \* MVR, in partnership with Independent Living Centers, will continue to provide technical assistance to public and private entities covered by the ADA.
- \* MVR will encourage implementation of the ADA in the private sector by implementing an agency-wide policy to contract for goods and services only with businesses that comply with the provisions of the ADA.

## LEADERSHIP

**STRATEGIC ISSUE #16:** How does MVR enhance and support leadership at all levels of the organization that will enhance the capability of the organization to do continual consensus building based on sound leadership principles?

**VISION:** To establish and maintain a climate within Montana VR in which members at all levels within the organization are self-motivated toward successful achievement of long-term constructive goals in an environment of mutual respect, collaboration, and consensus.

**STRATEGY 16:** To allow for the opportunity for all levels of staff to provide and receive feedback on critical issues affecting MVR's service delivery system.

### **ACTION AREAS:**

- \* Encourage supervisors at all levels to receive national rehabilitation leadership training through the National Leadership Executive Academy at the University of Oklahoma.
- \* Encourage mid-level supervisors to attend RRCEP sponsored supervisory workshops as well as in-state workshops dealing with leadership design.
- \* Establish communication at all levels of staff that ultimately result in consensus building and process improvement that is tied into consumer needs and expectations.
- \* Allow staff at all levels to be involved in "quality teams" that have responsibility for providing recommendations concerning agency policies and procedures.
- \* Provide feedback and set a climate so that staff at all levels are allowed to develop as individuals and rehabilitation professionals and encourage leadership activities by consistently reinforcing staff for their involvement.



**STRATEGIC ISSUE #17:** MVR will consistently identify and promote leadership principles that allow and encourage staff participation in the achievement of agency missions and goals.

**VISION:** To consistently identify and promote leadership principles that achieve the agency's mission, values, and goals.

**STRATEGY 17:** To see that all staff identify and promote leadership principles that accomplish our goals.

**ACTION AREAS:**

- \* Assure that all staff members are allowed to challenge the process and offer through consensus building, ideas for improving the system.
- \* Allow and encourage staff members to help inspire agency visions. Our collective vision is the force that invents the future.
- \* Encourage collaboration, build teams, and enable all staff members to act. The effect of allowing all staff members to act is to make them feel strong, capable, and committed to the agency.
- \* MVR leaders will continually be responsible for modeling the way for other staff members. They must steer projects along the course, measure performance, and their behavior must be consistent with the stated beliefs of the agency.
- \* Encouraging the heart - Montana MVR will make an extensive effort to celebrate our accomplishments. Our staff do not start their work each day with a desire to lose. We will make every effort to instill in our leaders that their responsibility is to show all staff that they can win. Individual and group recognition is an essential cornerstone in this leadership effort.

MVR has identified leadership at all levels of the organization as a high enough value that we will in our new staff evaluation program, allow each staff to identify a leadership project which will be evaluated. These projects may range from meeting with a group of legislators to attending job fairs, to meeting with groups of consumers in town meetings. The leadership project will be identified at its inception and will be a part of each individual's job performance activities.



## PROCESS FOR IMPLEMENTING AND EVALUATING STRATEGIC ISSUES

The following information establishes the specific criteria for determining whether the strategic or strategy issues have been achieved or that we are making substantial progress towards achieving these issues.

To provide continuity to the efforts of implementation and evaluation of strategic issues, MVR has established a Strategic Planning Committee. This committee is made up of representatives from the Rehabilitation Advisory Council and the Independent Living Advisory Council. This committee will convene when appropriate during the development of the three year strategic planning cycle and will provide direction, comments, and give recommendations on behalf of Montana consumers regarding the development and follow through on strategic issues, as well as discuss and resolve differences that may arise in providing the overall framework and guidance to strategic thinking within MVR.

Achievement of strategic issues will be evaluated as necessary on a monthly, quarterly or yearly basis depending upon the particular issue. Throughout the year, MVR will utilize this information as it convenes with its advisory councils and staff. MVR will utilize counselors, support staff, counselor supervisors, orientation and mobility specialists, rehabilitation teachers, district managers, and members of the central office staff to implement and evaluate the total program using the performance evaluation review process to ensure the provision of quality rehabilitation services to Montanans with disabilities.

A three level development evaluation performance analysis process has been identified and will be implemented:

### Level I:

Each individual who supervises a counselor will on a regular basis, review records, and will assess compliance with certain areas of responsibility within the Rehabilitation Act of 1973 as amended. This includes:

1. During a counselor's evaluation period, a random sample of case records will be reviewed. These reviews will be the basis for appraisal, feedback, and teaching/mentoring.
2. All records are subject to review by the supervisor when objective information substantiates the need for additional reviews.

3. Immediate feedback will be provided to each counselor regarding the results of the review of records.
4. Secretarial support duties will also be reviewed to ensure consistency with the provision of services by counselors and instructional staff.

**Level II:**

Each district manager will review records of individuals with disabilities quarterly to assure adequate office professional staff development and counselor supervisor performance.

**Level III:**

The field services chief will on a regular basis, review records of individuals with disabilities to evaluate professional staff development and district manager performance to ensure consistency throughout each of Montana's four regions.

Each strategic issue that has been identified in the collaborative effort to implement the Strategic Plan will be carefully reviewed not only by a responsible MVR staff member, but by consumer controlled Advisory Councils. The review and ongoing monitoring of the strategic issues will be the basis for an Advisory Council end of the year report which will be submitted to the Governor and the Rehabilitation Services Administration. This process allows and ensures that members of the MVR staff and consumers can work in a joint partnership to ensure the successful implementation of all strategic issues.



## 1.5% INNOVATION AND EXPANSION

The Rehabilitation Act Amendments of 1992 fundamentally redesigned the Innovation and Expansion Grant Program under Part C of Title I. The 1992 Amendments, in addition to mandating a written strategic plan, also mandate a new requirement that states use at least 1.5% of the federal portion of their part B allotment for one or more of the specified activities described in part C as Innovation and Expansion Program examples. The State of Montana has, as part of its strategic planning process, set up a cost accounting mechanism to account for and monitor the 1.5% of our federal grant that shall be utilized for the purposes described in Section 123. Responsibility centers will be set up through the Statewide Budget Information System to ensure appropriate record keeping and accountability for documenting expenditures. At the time of the writing of the Montana Strategic Plan our federal allotment is still uncertain, however 1.5% of the final allotted total will be set aside for the above-mentioned purpose.

After careful consultation with members of the MVR staff, the Montana Vocational Rehabilitation Advisory Council and the Independent Living Council, the following activities have been prioritized for Innovation and Expansion activities.

Montana's Strategic Plan as developed with input from both Advisory Councils, consumers, and staff members identifies seventeen strategies that need attention during this three-year planning cycle. We recognize that the 1.5% allotment will not cover all of the strategic activities as listed in the plan, however we feel that it is important that all of the strategic issues be identified as some will require little or no money for implementation. We have identified four major strategies for which the 1.5% allotment will be spent. The four strategies are all activities which are described in Section 123 of the Act.

1. Support and funding of both the State Rehabilitation Advisory Council and the statewide Independent Living Council. This will include but not be limited to funding regular meetings of the councils and funding council activities in relation to program evaluation, consumer satisfaction, annual reports to the Governor, and other activities conducted by the councils on behalf of the MVR agency. We estimate the cost of supporting and funding the Advisory Council to be approximately \$10,000.
2. Support the initiation, expansion, and improvement of Montana's Comprehensive System of Personnel Development. This category involves putting together a meeting for all staff members and all Advisory Council members to review on



a regular basis, agency mission, goals, and values as developed by the staff and the Advisory Councils.

In addition, our Comprehensive System of Personnel Development includes a forum on World Class Service. This is in an effort to ensure continuous and quality training particularly in the areas of consumer-centered service delivery. We estimate these activities will cost approximately \$30,000.

3. To expand and promote programs and activities that assist Montana employers in accommodating, evaluating, training, and hiring individuals with disabilities in the work place consistent with provisions of the Rehabilitation Act and Title I of the Americans with Disabilities Act. The MVR agency will ensure that the Governor's Committee on Employment of Persons with Disabilities expands its role and works in concert with the MVR agency in an effort to assure that more private and public sector employers in Montana understand and are provided with information regarding not only the hiring of people with disabilities, but accommodation and evaluation and training procedures that will enhance the hiring of MVR clients into competitive jobs. We estimate this initiative will cost \$10,000.
4. The next strategic initiative is designed around developing programs and activities which will improve the provision of and expand employment services in integrated settings to individuals with sensory, cognitive, physical, and mental impairments who have not traditionally been served by the state VR agency. Our project will involve community Requests for Proposals (RFP) for joint Independent Living and Community Rehabilitation Program endeavors designed to develop linkages between those two entities in an effort to provide a coordinated and consistent set of services for the above-named disability population. This RFP initiative will cost approximately \$30,000.

The remaining approximately \$35,000 involves activities as described in the checklist which meet the provisions under Section 123 of the Act that are already being done within the Montana Vocational Rehabilitation agency. These activities include things like setting up and coordinating ADA/Title I activities, training on the Reauthorization of the Rehabilitation Act, salaries associated with meeting and working on behalf of either of the Advisory Councils. We estimate these costs to be approximately \$35,000.

It must be noted that all of the above costs are only estimates as we are still unsure as to what amount our federal grant award will be and what accompanying 1.5% allotment will be.

Consistent review, evaluation, and prioritization of our 1.5% activities will be ongoing in conjunction with members of our Advisory Councils and staff. Priorities may change based on differing circumstances within the agency and we may be making new strategy developments depending upon the advice of our Advisory Councils.





# Appendix A









